

**STATE OF WISCONSIN
DEPARTMENT OF EMPLOYEE TRUST FUNDS
WRS DISABILITY BENEFIT ANNUITY STATISTICAL REPORT
2003: June-July-Aug**

This report provides a summary of disability information for the Board's review. Department staff have reviewed and made the following recommendations on initial disability applications submitted by participants. Staff review individual participant applications on an ongoing basis to determine if disability benefits can continue. If you have questions or would like additional information regarding disability benefits, please contact Audrey Koehn at (608) 261-8173 or Audrey.Koehn@etf.state.wi.us, Peg Narloch at (608) 267-9035 or Peg.Narloch@etf.state.wi.us

The following key describes the type of disability determinations made by ETF staff:

Approved – Disability applications that meet the service, medical and employer criteria required under §40.63 (1) and (4), Wis. Stats., are approved and processed for benefit payments.

Cancelled – Disability applications that are incomplete within one year after the Department receives the disability application are cancelled. Applications are considered incomplete if the Department has not received the required medical certification and/or employer statement.

Deemed Approved – Disability applications are deemed approved if the applicant meets the service requirement and the Department receives a valid disability application and one *Medical Report* certifying the applicant's disability prior to the applicant's death. The employer is also required to submit an Employer Statement.

Denial – Disability applications are denied if the applicant does not meet all of the statutory requirements (service, medical and employer statement).

Denial Rescinded: Approved – This determination is used for disability applications in situations where the application was initially denied because the applicant does not meet the statutory requirements and the denial has since been overturned and the application approved due to receipt of additional information or as determined by the appropriate Board.

Termed – Disability applications that were initially approved and benefit payments made may be terminated if the Department receives information from a physician certifying that the individual no longer meets the medical definition for a disability or the individual does not comply with requests for medical or financial information.

Withdrawn – This determination is used when disability applications are withdrawn at the request of the applicant. This occurs most often when an applicant returns to active employment and no longer meets the statutory requirements for a disability benefit.

WRS DISABILITY ANNUITIES

| DISABILITY BENEFITS | | | | |
|--|---------------|---------------|---------------|--------------|
| | Jun-03 | Jul-03 | Aug-03 | Total |
| Disability Estimates Requested | 61 | 89 | 73 | 223 |
| Disability Estimates Completed | 56 | 87 | 70 | 213 |
| | | | | |
| | Jun-03 | Jul-03 | Aug-03 | Total |
| Disability Annuities Started (on payroll) | | | | |
| Teachers Retirement Board s. 40.63 | 14 | 11 | 7 | 32 |
| Wisconsin Retirement Board s. 40.63 | 13 | 14 | 10 | 37 |
| s. 40.65 Duty Disability (WR Board) | 2 | 5 | 3 | 10 |
| Total Annuities Started | 29 | 30 | 20 | 79 |

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| Board | Mtg Date | Item # |
|-------|-----------|--------|
| TR | 9/25/2003 | 4 |
| WR | 9/25/2003 | 5 |

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| TEACHERS BOARD DISABILITY ANNUITIES STARTED BY OPTION SELECTED | | | | |
|---|---------------|---------------|---------------|--------------|
| <u>Option</u> | Jun-03 | Jul-03 | Aug-03 | Total |
| 12 100% Continued to Named Survivor (Joint Survivor) with 180 Payments Guaranteed | 3 | 1 | 3 | 7 |
| 17 Life Annuity with 60 Payments Guaranteed | 3 | 1 | 1 | 5 |
| 24 For Annuitant's Life Only | 1 | 0 | 0 | 1 |
| 25 Life Annuity with 180 Payments Guaranteed | 5 | 5 | 1 | 11 |
| 26 75% Continued to Named Survivor (Joint Survivor) | 1 | 3 | 0 | 4 |
| 27 100% Continued to Named Survivor (Joint Survivor) | 1 | 1 | 2 | 4 |
| 28 75% Continued to Annuitant or Named Survivor (Joint Survivor) Upon Death of Either | 0 | 0 | 0 | 0 |
| TOTAL | 14 | 11 | 7 | 32 |

| TEACHERS BOARD DISABILITY ANNUITIES STARTED BY GENDER | | | | |
|--|---------------|---------------|---------------|--------------|
| <u>s. 40.63 Disability Benefits by Gender</u> | Jun-03 | Jul-03 | Aug-03 | Total |
| Females | 11 | 6 | 4 | 21 |
| Males | 3 | 5 | 3 | 11 |
| TOTAL | 14 | 11 | 7 | 32 |

TEACHERS BOARD DISABILITY STATISTICS FOR APPLICATIONS SUBMITTED

| TEACHERS BOARD DISABILITY APPLICATIONS SUBMITTED BY DETERMINATION | | | | |
|--|---------------|---------------|---------------|--------------|
| <u>Type of Determination</u> | Jun-03 | Jul-03 | Aug-03 | Total |
| Approval | 10 | 5 | 5 | 20 |
| Cancelled | 0 | 0 | 0 | 0 |
| Deemed Approved | 0 | 0 | 1 | 1 |
| Denial | 0 | 0 | 0 | 0 |
| Denial Rescinded: Approval | 0 | 0 | 0 | 0 |
| Termed | 1 | 0 | 1 | 2 |
| Termed Rescinded: Approval | 0 | 0 | 0 | 0 |
| Withdrawn | 0 | 1 | 0 | 1 |

| TEACHERS BOARD DISABILITY APPLICATIONS SUBMITTED BY AGE | | | | |
|--|---------------|---------------|---------------|--------------|
| <u>s. 40.63 Disability Benefits by Age</u> | Jun-03 | Jul-03 | Aug-03 | Total |
| 31-35 | 0 | 0 | 0 | 0 |
| 36-40 | 1 | 0 | 0 | 1 |
| 41-45 | 1 | 1 | 1 | 3 |
| 46-50 | 1 | 0 | 1 | 2 |
| 51-55 | 7 | 4 | 3 | 14 |
| 56-60 | 1 | 1 | 2 | 4 |
| 61-65 | 0 | 0 | 0 | 0 |
| TOTAL | 11 | 6 | 7 | 24 |

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| TEACHERS BOARD DISABILITY APPLICATIONS SUBMITTED BY DISABILITY TYPE | | | | |
|--|---------------|---------------|---------------|--------------|
| Disability Type | Jun-03 | Jul-03 | Aug-03 | Total |
| Brain Injury | 0 | 0 | 0 | 0 |
| Cancer | 1 | 0 | 2 | 3 |
| Cardiovascular | 1 | 0 | 2 | 3 |
| Chronic Fatigue | 0 | 0 | 0 | 0 |
| Eye Disorders | 0 | 0 | 0 | 0 |
| Gastro/Intestinal | 0 | 0 | 0 | 0 |
| Mental Illness | 3 | 2 | 1 | 6 |
| Multiple Medical Problems | 1 | 0 | 0 | 1 |
| Multiple Sclerosis | 0 | 0 | 0 | 0 |
| Muscle/Tissue | 2 | 0 | 1 | 3 |
| Nephrology | 0 | 0 | 0 | 0 |
| Neurology | 1 | 3 | 0 | 4 |
| Orthopedic | 1 | 0 | 1 | 2 |
| Other | 1 | 0 | 0 | 1 |
| RSD-Reflex Symptathetic Dystorphy | 0 | 1 | 0 | 1 |
| Respiratory | 0 | 0 | 0 | 0 |
| TOTAL | 11 | 6 | 7 | 24 |

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| WI RETIREMENT BOARD DISABILITY ANNUITIES STARTED BY OPTION SELECTED | | | | |
|---|---------------|---------------|---------------|--------------|
| Option | Jun-03 | Jul-03 | Aug-03 | Total |
| 12 100% Continued to Named Survivor (Joint Survivor) with 180 | 7 | 5 | 1 | 13 |
| 17 Life Annuity with 60 Payments Guaranteed | 1 | 1 | 3 | 5 |
| 24 For Annuitant's Life Only | 3 | 1 | 4 | 8 |
| 25 Life Annuity with 180 Payments Guaranteed | 1 | 4 | 1 | 6 |
| 26 75% Continued to Named Survivor (Joint Survivor) | 0 | 1 | 1 | 2 |
| 27 100% Continued to Named Survivor (Joint Survivor) | 1 | 1 | 0 | 2 |
| 28 75% Continued to Annuitant or Named Survivor (Joint Survivor) Upon Death of Either | 0 | 1 | 0 | 1 |
| TOTAL | 13 | 14 | 10 | 37 |

| WI RETIREMENT BOARD DISABILITY ANNUITIES STARTED BY GENDER | | | | |
|---|---------------|---------------|---------------|--------------|
| s. 40.63 Disability Benefits by Gender | Jun-03 | Jul-03 | Aug-03 | Total |
| Female | 8 | 9 | 4 | 21 |
| Male | 5 | 5 | 6 | 16 |
| TOTAL | 13 | 14 | 10 | 37 |

WI RETIREMENT BOARD DISABILITY STATISTICS FOR APPLICATIONS SUBMITTED

| WI RETIREMENT BOARD DISABILITY APPLICATIONS SUBMITTED BY DETERMINATION | | | | |
|---|---------------|---------------|---------------|--------------|
| Type of Determination | Jun-03 | Jul-03 | Aug-03 | Total |
| Approval | 15 | 14 | 13 | 42 |
| Cancelled | 1 | 0 | 1 | 2 |
| Deemed Approved | 0 | 0 | 0 | 0 |
| Denial | 0 | 1 | 1 | 2 |
| Denial Rescinded: Approval | 0 | 0 | 0 | 0 |
| Other | 0 | 0 | 0 | 0 |
| Termed | 0 | 0 | 1 | 1 |
| Term. Rescinded | 0 | 0 | 1 | 1 |
| Withdrawn | 0 | 2 | 3 | 5 |

| WI RETIREMENT BOARD DISABILITY APPLICATIONS SUBMITTED BY AGE | | | | |
|---|---------------|---------------|---------------|--------------|
| s. 40.63 Disability Benefits by Age | Jun-03 | Jul-03 | Aug-03 | Total |
| 31-35 | 0 | 0 | 0 | 0 |
| 36-40 | 0 | 0 | 3 | 3 |
| 41-45 | 0 | 1 | 0 | 1 |
| 46-50 | 6 | 7 | 1 | 14 |
| 51-55 | 5 | 6 | 9 | 20 |
| 56-60 | 4 | 3 | 7 | 14 |
| 61-65 | 1 | 0 | 0 | 1 |
| TOTAL | 16 | 17 | 20 | 53 |

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| WI RETIREMENT BOARD DISABILITY DETERMINATIONS | | | | |
|--|---------------|---------------|---------------|--------------|
| <u>Disability Type</u> | Jun-03 | Jul-03 | Aug-03 | Total |
| Brain Injury | 0 | 0 | 0 | 0 |
| Cancer | 2 | 1 | 3 | 6 |
| Cardiovascular | 2 | 1 | 1 | 4 |
| Diabetes | 1 | 1 | 0 | 2 |
| Eye Disorders | 0 | 0 | 1 | 1 |
| Mental Illness | 1 | 3 | 2 | 6 |
| Multiple Medical Problems | 2 | 3 | 2 | 7 |
| Muscle/Tissue | 1 | 2 | 2 | 5 |
| Multiple Sclerosis | 0 | 0 | 1 | 1 |
| Nephrology | 0 | 0 | 0 | 0 |
| Neurology | 0 | 2 | 2 | 4 |
| Orthopedic | 5 | 4 | 4 | 13 |
| Other | 1 | 0 | 0 | 1 |
| Respiratory | 1 | 0 | 1 | 2 |
| Unknown | 0 | 0 | 1 | 1 |
| TOTAL | 16 | 17 | 20 | 53 |